

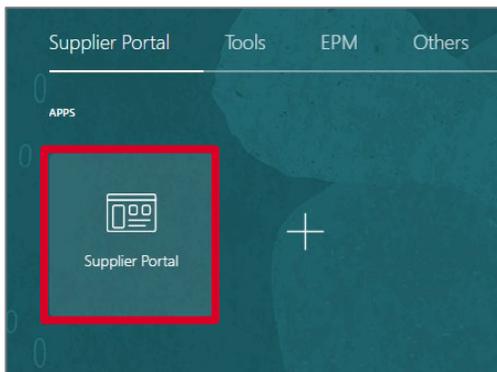
Purpose: This job aid provides the steps for submitting invoices and credit memos.

SUBMIT AN INVOICE OR CREDIT MEMO

Submit an Invoice or Credit Memo from a PO

1. From the Oracle Homepage, click **Supplier Portal**. If you don't see the Oracle Homepage pictured below, click **Home** in the upper-right corner of the screen.

Note: if you do not already have access to Supplier Portal, navigate to <https://www.republicservices.com/suppliers/supplier-register> and scroll to the bottom of the screen to request access.



2. Click **Create Invoice** from the Tasks list on the left side of the screen.



3. Select the **Identifying PO** from the drop-down menu. Once an Identifying PO is selected, the Supplier Site auto-populates. If the Supplier Site doesn't populate, select the appropriate site from the **Supplier Site** drop-down menu.

Note: If you are unable to find the PO Number, click the drop-down arrow and select Search. From the Search and Select screen, enter the **Purchase Order** number, then click **Search**.

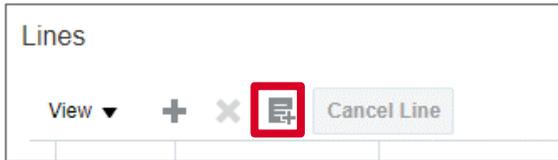
4. Enter additional Invoice Header information including the **Number**, **Date**, and **Type** (i.e., Invoice, Credit Memo).

The screenshot shows the 'Create Invoice' form with various input fields. A red box highlights the 'Number', 'Date', and 'Type' fields in the top right corner. The 'Number' field is empty, the 'Date' field is set to 'm/d/yy', and the 'Type' dropdown is set to 'Invoice'. Other fields include 'Identifying PO', 'Supplier', 'Taxpayer ID', 'Supplier Site', 'Address', 'Supplier Tax Registration Number', 'Remit-to Bank Account', 'Unique Remittance Identifier', 'Check Digit', 'Description', 'Attachments', 'Tax Control Amount', 'Customer Taxpayer ID', 'Name', and 'Address'.

5. To add a PDF of the invoice, click the **Attachments +** icon and select the appropriate file.

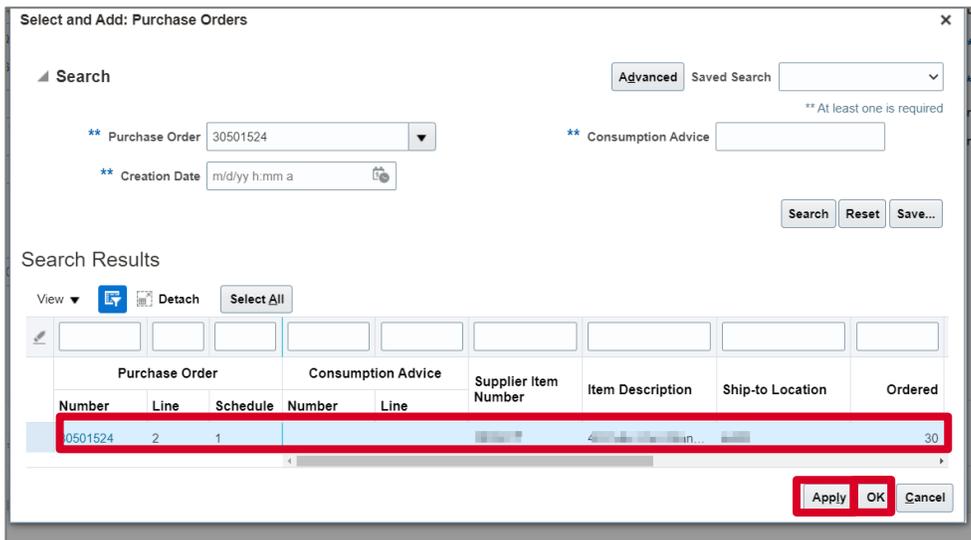
The screenshot shows the 'Create Invoice' form with the 'Attachments' field highlighted in a red box. The 'Attachments' field is currently set to 'None'. The 'Number', 'Date', and 'Type' fields are also visible, with 'Number' empty, 'Date' set to 'm/d/yy', and 'Type' set to 'Invoice'. Other fields include 'Identifying PO', 'Supplier', 'Taxpayer ID', 'Supplier Site', 'Address', 'Supplier Tax Registration Number', 'Remit-to Bank Account', 'Unique Remittance Identifier', 'Check Digit', 'Description', 'Tax Control Amount', 'Customer Taxpayer ID', 'Name', and 'Address'.

6. In the Lines Section, click the select and add icon.



7. Select the Lines you would like to add to the Invoice or Credit Memo, then click **Apply** and **OK**. The line will be added to the Invoice.

Note: To add multiple lines, press and hold the **CTRL key** and select the appropriate lines. Lines added to an invoice will be a positive value. Lines added to a credit memo default to a negative value.

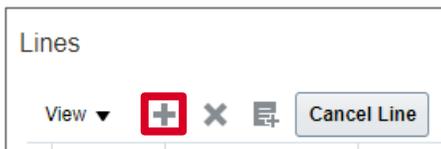


8. Confirm the accuracy of the quantity and unit price of the Lines you added to the invoice.

Note: Oracle does not allow you to bill more than the available quantity or higher than the unit price on the PO. If either of those need to be increased, contact the PO requester to create a change order.

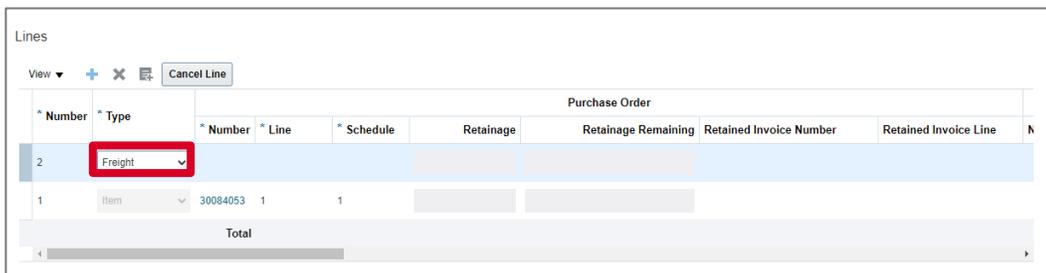
Available Quantity	Quantity	Unit Price	UOM
8	<input type="text" value="8"/>	<input type="text" value="123"/>	Each

9. To add additional costs, click the **plus sign icon**.



10. Select the PO type (e.g., Freight, Item, Miscellaneous) from the **Type** drop-down menu.

Note: if there is an item on a PO that needs to be changed or that is missing, contact the PO requester to create a change order. Item/Miscellaneous should only be used for ancillary charges and not for lines not listed on the PO.



Purchase Order								
* Number	* Type	* Number	* Line	* Schedule	Retainage	Retainage Remaining	Retained Invoice Number	Retained Invoice Line
2	Freight							
1	Item	30084053	1	1				
Total								

11. Scroll to the right and enter the invoice amount.

Lines

View + × ☰ Cancel Line

Unit Price	UOM	* Amount	Transaction Business Category	Intended Use	Product Fiscal Classification	User-Defined Fiscal Classification	Product Type	Product Category
			Purchase Transa					
3.9	Each	3.90	Purchase Transa				Services	
		3.90						

Note: Frequently used columns can be moved by clicking on a column header to select it, then dragging it to where to the desired location. In the example below, *Amount* was highlighted and dragged closer to the left side of the screen.

Lines

View + × ☰ Cancel Line

Item Description	Ship-to Location	Ship-from Location	Tax Classification	Location of Final Discharge	Available Quantity	Quantity	Unit Price	UOM	* Amount	Transaction Business Category	Intended Use	Product Fiscal Classification	User-Defined Fiscal Classification	Prod
			***VENDOR CI							Purchase Transa				
Pressure gauge - color cod...	6943		***VENDOR CI		1	1	136.9	Each	136.90	Purchase Transa				Goo
Ground Fed - Integral Rear ...	6943		***VENDOR CI		1	1	7430.21	Each	7,430.21	Purchase Transa				Goo
									7,567.11					

Lines

View + × ☰ Cancel Line

Purchase Order										Consumption Advice		Supplier Item	Item Description	Ship
Number	Type	Number	Line	Schedule	Retainage	Retainage Remaining	Retained Invoice Number	Retained Invoice Line	* Amount	Number	Line			
3	Freight													
2	Item	3005144	4	1					136.90			C0116	Pressure gauge - color cod...	694
1	Item	3005144	3	1					7,430.21			C0888	Ground Fed - Integral Rear ...	694
Total									7,567.11					

12. Enter applicable taxes (in total dollars) in the **Tax Control Amount** field. Ignore any reference to *Vertex* tax.

Note: if you are submitting a credit memo and need to credit taxes, enter a negative number in the tax control amount field.

The screenshot shows a form for creating an invoice. The 'Tax Control Amount' field is highlighted with a red border. Other fields include 'Remit-to Bank Account', 'Unique Remittance Identifier', 'Unique Remittance Identifier Check Digit', 'Description', 'Attachments', 'Number', 'Date', 'Type', 'Invoice Currency', and 'Payment Currency'.

13. Click the **Invoice Actions** drop-down menu in the upper-right corner, then click **Calculate Tax**.

The screenshot shows the 'Invoice Actions' menu open, with 'Calculate Tax' selected. The 'Tax Control Amount' field now contains the value '100.00'. Other fields are visible, including 'Remit-to Bank Account', 'Unique Remittance Identifier', 'Unique Remittance Identifier Check Digit', 'Description', 'Attachments', 'Name', and 'Address'.

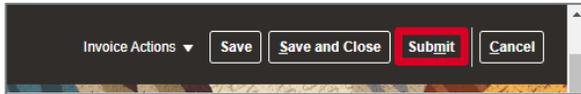
14. Once the tax control amount is calculated, the tax amount appears in the *Totals* section along the bottom.

Note: The Invoice Amount shown in the Totals section includes any added lines, taxes, and other ad hoc fees (e.g., Miscellaneous, Items, Freight).

Totals						
Items	Freight	Miscellaneous	Inclusive Tax	Exclusive Tax	Retainage	Invoice Amount
504.03	0.00	0.00	0.00	100.00	0.00	604.03
					Due	536.03

15. Review the invoice for accuracy. If all information is correct, click **Submit**.

Note: Clicking *Save and Close* does not submit the invoice for approval. Saved invoices are marked as *Incomplete* and will be automatically cancelled after seven days. Always try to complete and fully submit an invoice once you begin creating it. If an invoice is still needed after it has been cancelled, please create a new invoice.



16. The invoice is submitted for approval.

Note: If you realize you made a mistake on the invoice (e.g., wrong quantity, forgot taxes) and need to resubmit it, email InvoiceChange@republicservices.com to cancel the invoice. Once they confirm the cancellation you can resubmit the invoice through Supplier Portal however you will need to add a suffix to the end of the invoice number as Oracle requires a unique value.